

**KINGDOM OF MOROCCO**



**MINISTRY OF EQUIPEMENT, TRANSPORT AND LOGISTICS  
DIRECTION OF AIR TRANSPORT**

# **AIR TRANSPORT AND TOURISM IN MOROCCO**

**COMCEC - 4th meeting**

**Nabil LAKHEL  
Director of Transport Aérien**

**ANKARA  
11 September 2014**



# Contents

- 
- 1 The air transport policy in Morocco**
  - 2 Strategy of the development of air transport 2012-2016**
  - 3 Overview on the market of air transport in Morocco**
  - 4 Air transport and tourism in Morocco (vision 2020)**

# Contents



1

**The air transport policy in Morocco**

2

Strategy of the development of air transport 2012-2016

3

Overview on the market of air transport in Morocco

4

Air transport and tourism in Morocco (vision 2020)

# 1. The air transport policy in Morocco

## Liberalization process of the air transport in Morocco

### Vision 2010

Promouvoir une politique libérale de transport aérien et favoriser la création de nouvelles compagnies régulières et de charter, ainsi que l'accès à des prix compétitifs pour les compagnies étrangères

2001

2004

2006

A partir de 2008

### Politique de libéralisation du secteur du transport aérien

- Poursuite d'une libéralisation cadrée et transparente
- Création d'un nouvel acteur national fort et spécialisé dans la desserte de destinations touristiques
- Relocalisation stratégique de la RAM sur le trafic régulier traditionnel
- Approche pragmatique et différenciée par pays-cible en coordination avec le Ministère du Tourisme
- Politique d'accompagnement volontariste non discriminatoire dans la phase de lancement

- Restructuration de la DGAC suite aux recommandations de l'OACI et du programme PAST (UE)

### Accord Euro-méditerranéen: EU-Maroc

- Ouverture progressive vers l'accès au marché entre le Maroc et l'EU, alignement sur la législation européenne
- Une convergence avec l'UE au niveau réglementaire est un facteur clé pour la poursuite de la libéralisation.

# 1. The air transport policy in Morocco

## Air Services Agreements concluded by Morocco



# Contents



- 1** The air transport policy in Morocco
- 2** Strategy of the development of air transport 2012-2016
- 3** Overview on the market of air transport in Morocco
- 4** Air transport and tourism in Morocco (vision 2020)

## 2. Strategy of the development of air transport 2012-2016

Five themes constitute the strategy of the Ministry of Transport, Equipment and Logistics regarding civil aviation and air transport sector for the period 2012 -2016:



**Pole of Development of the air transportation**



**Institutional pole**



**Pole of Safety, Security and Quality of Civil Aviation**



**Training Pole**



**Pole of airports capacity and airspace**

## 2. Strategy of the development of air transport 2012-2016

### Pole of Development of the air transportation



- Positioning Casablanca / Mohamed V as reference HUB in North Africa airport;
- Consolidation of air services in the European market in order to achieve the objectives of Vision 2020;
- Promotion of domestic air transport;
- Development of Air Freight in Morocco;
- Implementation of the provisions of the program contract between the State and Royal Air Morocco.



### Institutional pole



### Pole of Safety, Security and Quality of Civil Aviation



### Training Pole



### Pole of airports capacity and airspace

## 2. Strategy of the development of air transport 2012-2016



### Pole of Development of the air transportation



### Institutional pole

- Adoption of the bill (40-13) regarding the Code of Civil Aviation and development of implementing legislation;
- Strengthening the economic regulation of air transport;
- Establishment of the Observatory of Air Transport (OTA).



### Pole of Safety, Security and Quality of Civil Aviation



### Training Pole



### Pole of airports capacity and airspace

## 2. Strategy of the development of air transport 2012-2016



### Pole of Development of the air transportation



### Institutional pole

### Pole of Safety, Security and Quality of Civil Aviation



- Upgrade the national rules on aviation safety in accordance with international standards;
- Strengthen supervision of air safety and monitoring of the aviation industry;
- Increase the level of safety of civil aviation in Morocco;
- Improve the quality of air transport services.



### Training Pole



### Pole of airports capacity and airspace

## 2. Strategy of the development of air transport 2012-2016



### Pole of Development of the air transportation



### Institutional pole



### Pole of Safety, Security and Quality of Civil Aviation



### Training Pole

- Creation of a training center for the civil aviation sector;
- Human resource development of the Moroccan CAA: values, skills, abilities, motivation and improving the system of lifelong learning;



### Pole of airports capacity and airspace

## 2. Strategy of the development of air transport 2012-2016



### Pole of Development of the air transportation



### Institutional pole



### Pole of Safety, Security and Quality of Civil Aviation



### Training Pole



### Pole of airports capacity and airspace

- Development of airport platforms
- Reorganization of Moroccan airspace.

# Contents



1

The air transport policy in Morocco

2

Strategy of the development of air transport 2012-2016

3

Overview on the market of air transport in Morocco

4

Air transport and tourism in Morocco (vision 2020)

### 3. Overview on the market of air transport in Morocco



#### Evolution of the number of air carriers operating flights towards Morocco

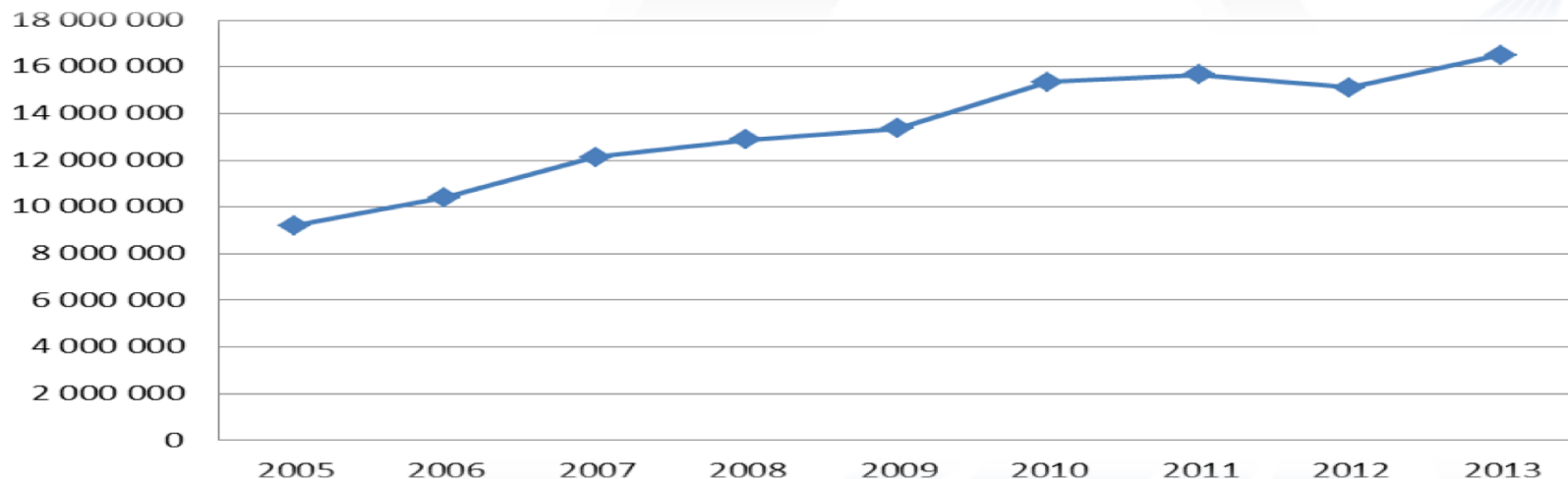
**44 regular airlines (including 14 LCC) are actually** operating flights towards Morocco (IATA summer season 2014) against 22 carriers in 2003 :

- ✓ **03 moroccan companies.**
  - RAM
  - RAM Express
  - Air Arabia Maroc (created in 2009)
- ✓ **12 carriers from non-european countries.**
- ✓ **29 carriers from european countries including Turkey.**

### 3. Overview on the market of air transport in Morocco

#### Evolution of the air traffic in Morocco

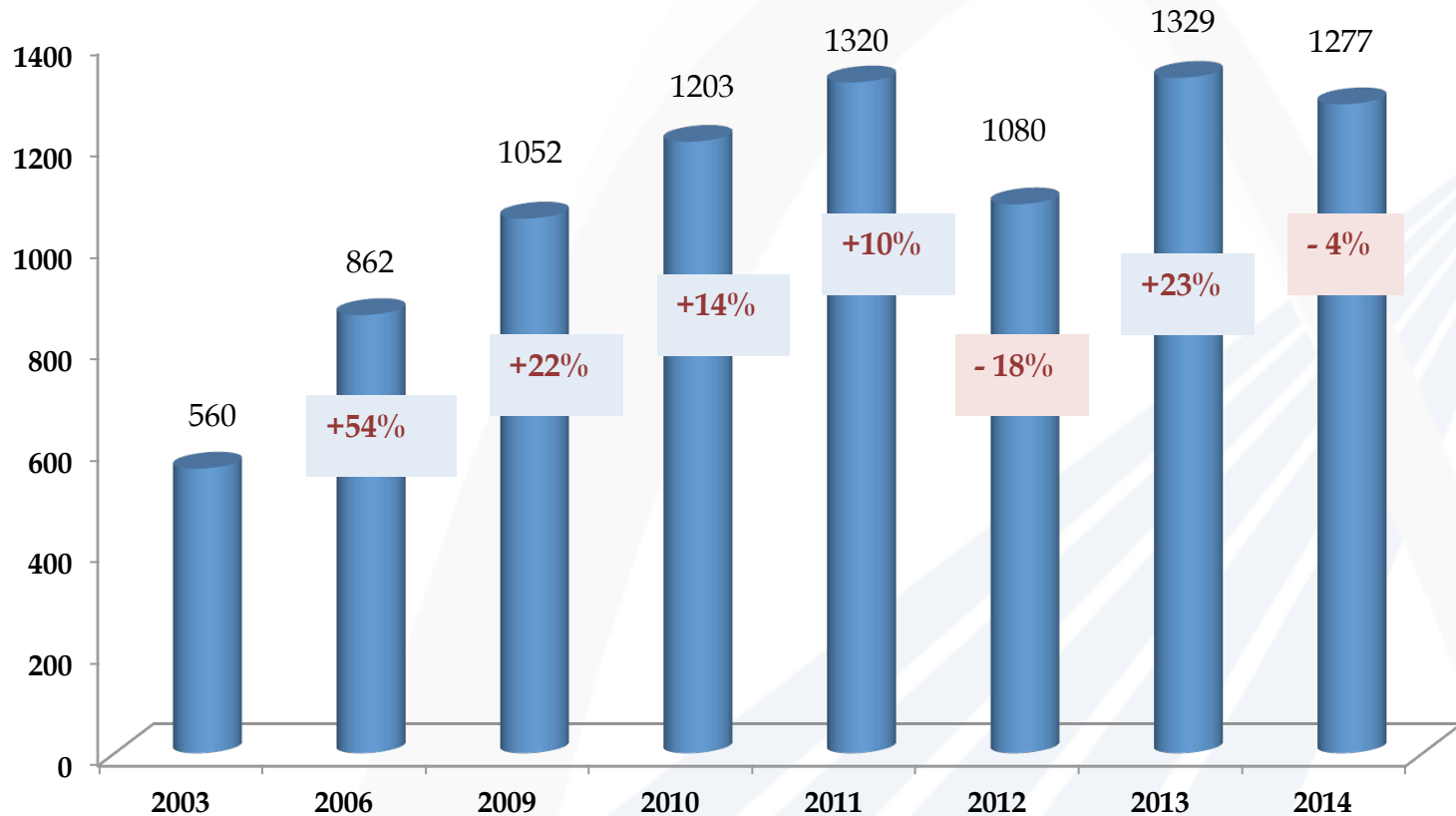
	2005	2006	2007	2008	2009	2010	2011	2012	2013
Commercial traffic (Pax)	9 192 770	10 395 552	12 126 581	12 866 461	13 350 011	15 361 841	15 669 918	15 104 662	16 496 191
Var (%)		13,08	16,65	6,10	3,76	15,07	2,01	-3,61	9,21



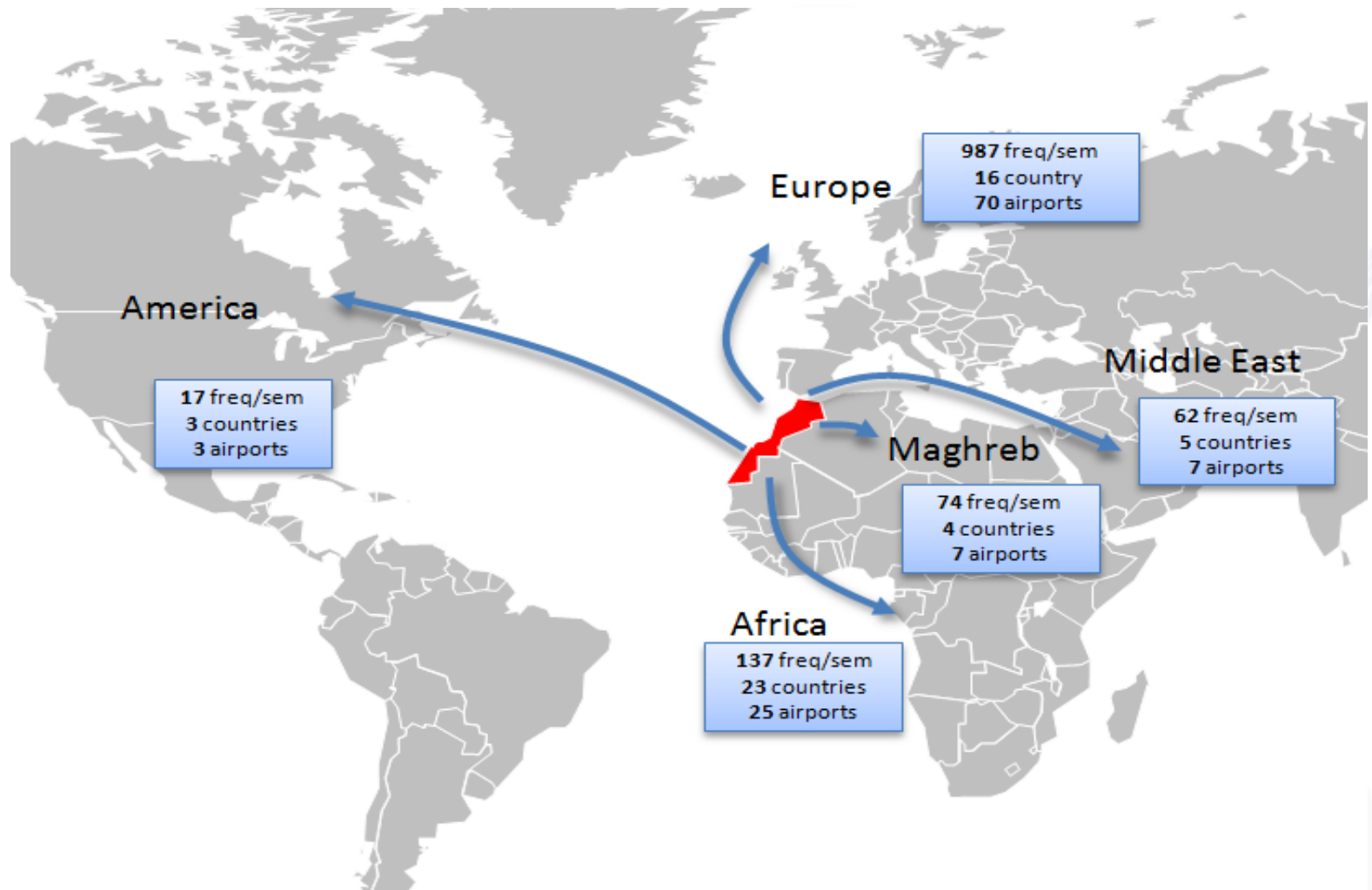
Due to the Open Sky agreement in 2006, commercial air passenger traffic in Morocco has experienced an overall positive upward trend despite of difficult international context marked by the global financial crisis, the events of the Arab Spring in 2011 and the increase of the crude oil price.

### 3. Overview on the market of air transport in Morocco

**Evolution of the total frequencies 2003 - 2014 (Summer Season)**

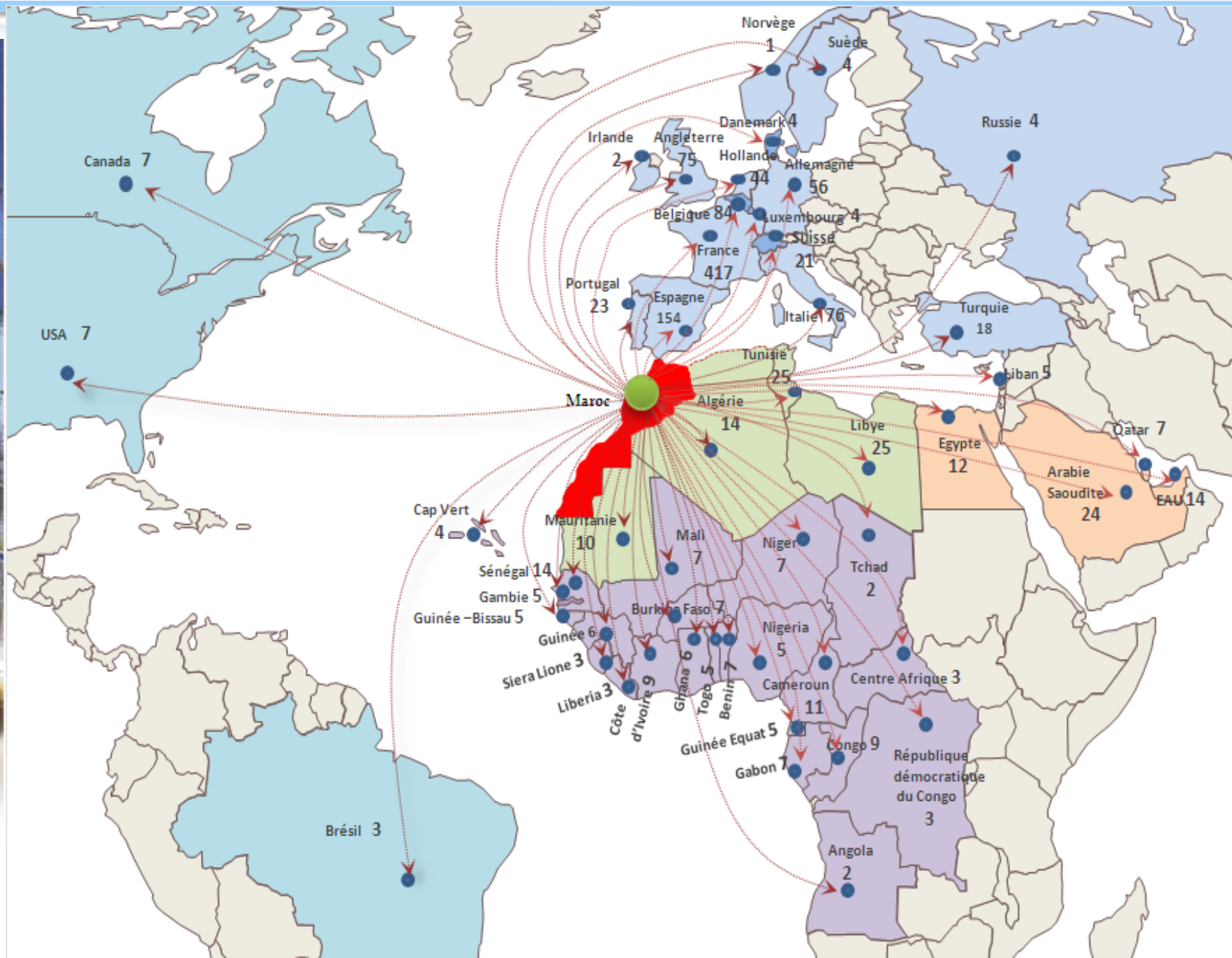


### 3. Overview on the market of air transport in Morocco

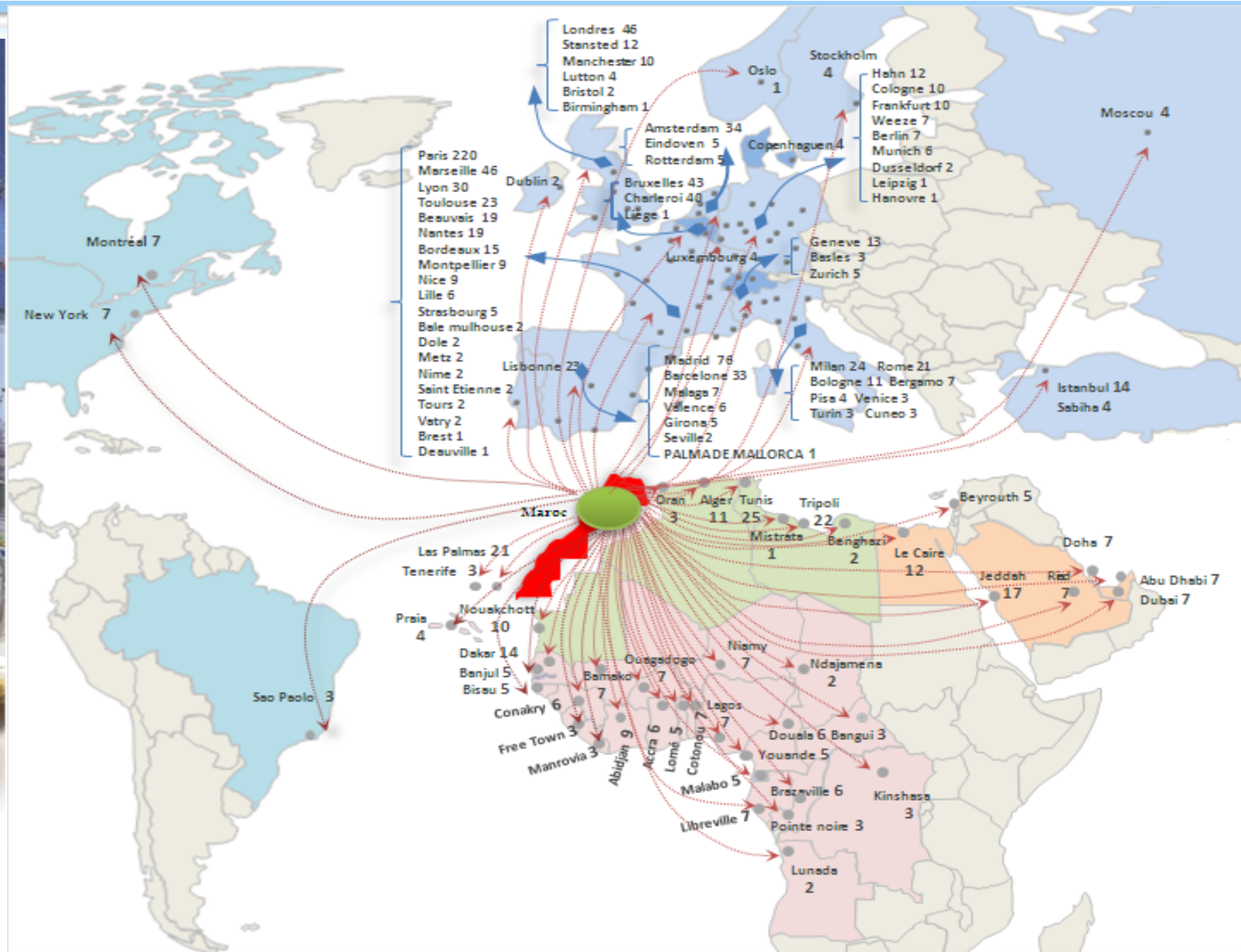


During the summer season 2014, 1,277 weekly flights have been scheduled. Morocco is currently connected to 51 countries and 112 foreign airports via regular routes.

### 3. Overview on the market of air transport in Morocco



### 3. Overview on the market of air transport in Morocco



# Contents



The air transport policy in Morocco



Strategy of the development of air transport 2012-2016



Overview on the market of air transport in Morocco



**Air transport and tourism in Morocco (vision 2020)**



## 4. Air transport and tourism in Morocco (vision 2020)

### Air transport and Tourism

The airline industry is a major lever for the tourism development and a fundamental tool for improving the socio-economic integration of the regions.

Tourism occupies a prominent place in the economic and financial structure of the country and represents a major lever for accelerating socio-economic growth. Tourism impacts virtually all areas of economic activity in Morocco and has a great influence on other sectors of the economy.

During 2013, 10 million tourists visited Morocco: 132 million overnight stays. These visitors are distinguished in two categories:

53% are foreign tourists

47% of Moroccans living abroad



## 4. Air transport and tourism in Morocco (vision 2020)

### Air transport and Tourism

66% of the total arrivals to Morocco use air transport services and foreign tourists mainly use the plane (83%) to get to Morocco.

Due to the geographical proximity, 40% of the Spanish tourists choose the plane to get to Morocco and 22% of them drive from Spain to Morocco using the ferry service.

For the moroccans living abroad, the plane remains the first mode of transportation to get to Morocco (47%), followed by car (29%) and the ferry (23%).

The five most moroccan destinations visited in 2013 are Marrakech, Agadir, Casablanca, Tangier and Rabat. These destinations have hosted 54% of all visits to the country and 47% of the total nights.

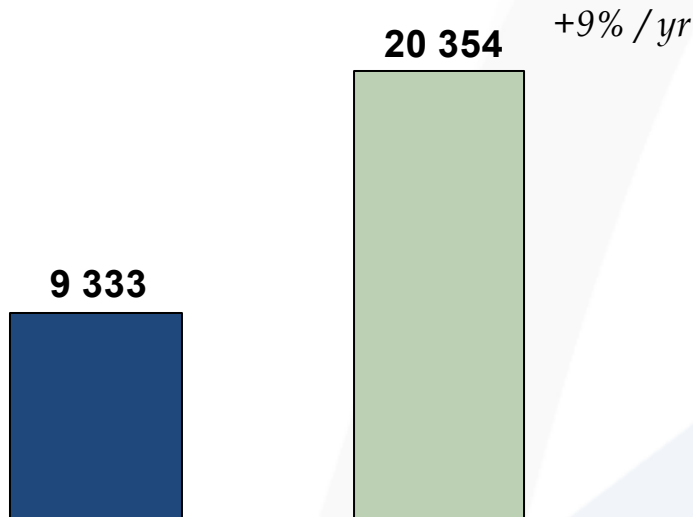
Marrakech is one of the most popular destinations where tourism has greatly promoted the rediscovery of its flourishing handicraft, and the rehabilitation of its distinguished architectural styles.



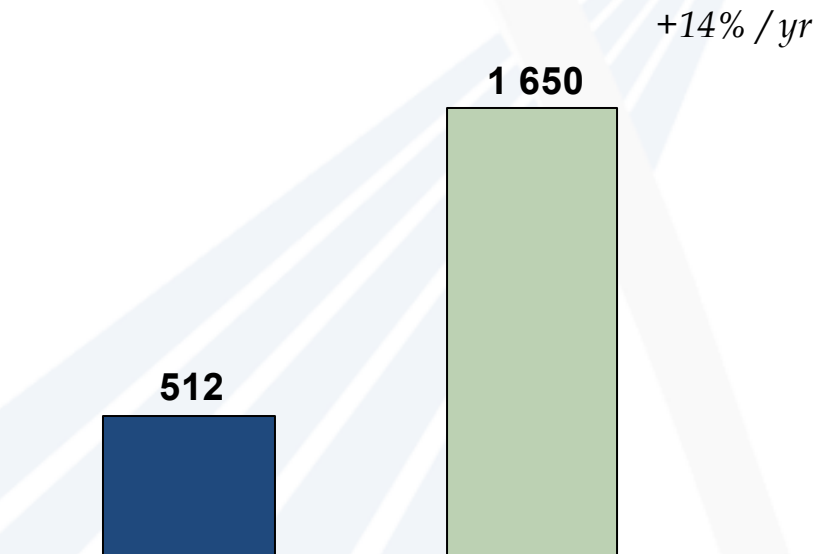
## 4. Air transport and tourism in Morocco (vision 2020)

The objectives of the Vision 2020 result in accelerated growth of arrivals and the air services.

Tourist Arrivals by 2020  
Pax number (2010-2020)



Besoins en desserte aérienne,  
Number of weekly frequencies  
except Casa and Rabat (2003-2020)



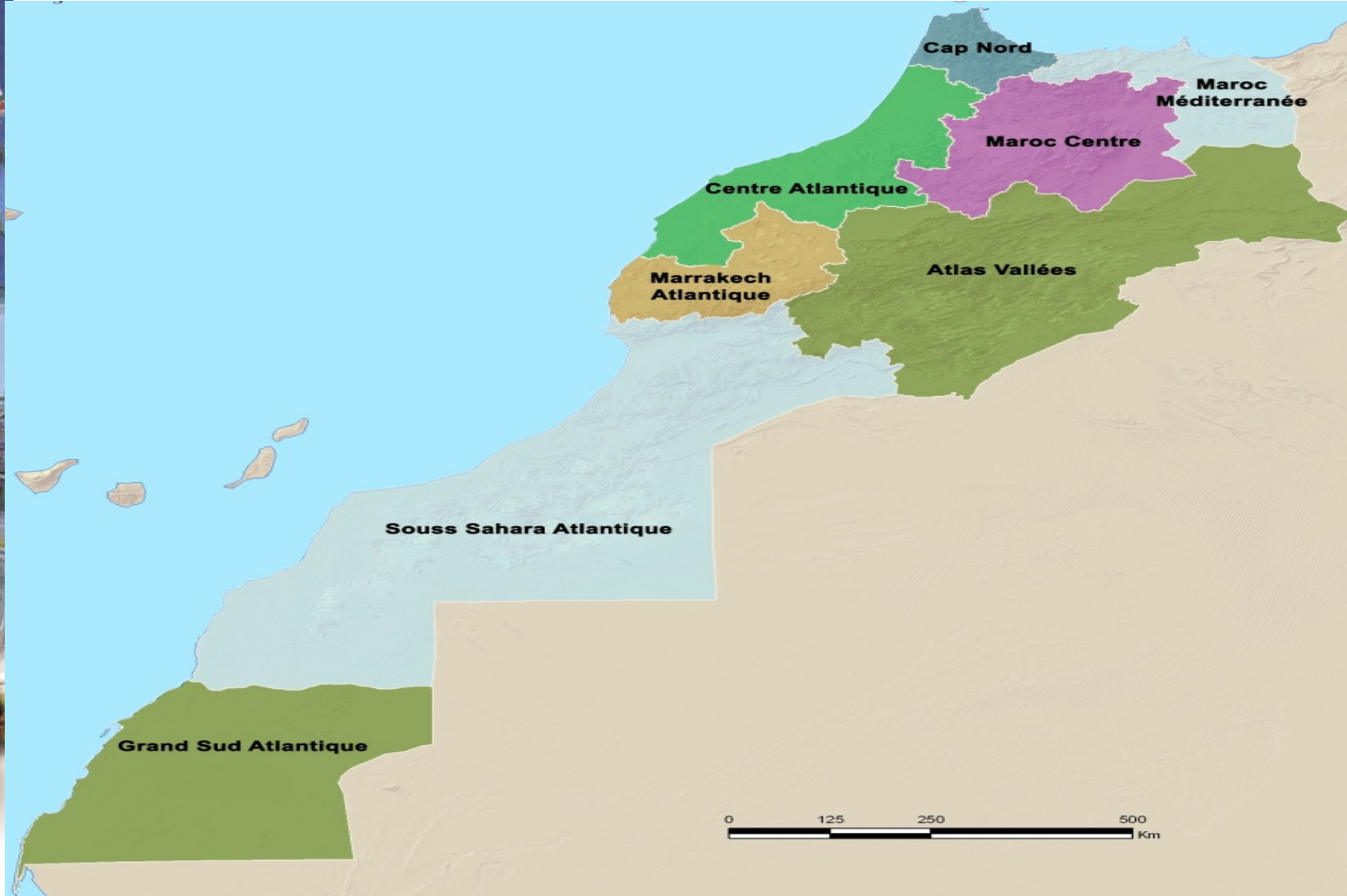
## 4. Air transport and tourism in Morocco (vision 2020)



### **Strategic challenges regarding the air transport vision:**

- Spread the air transport growth on the Moroccan territory
- Development of seaside (Souss Sahara Atlantic, Mediterranean Morocco)
- Emergence of new destinations culture, nature and city break
- Develop new markets
- Increase regional coverage in the potential markets
- Develop a mix respecting the preferences of future tourists

## 4. Air transport and tourism in Morocco (vision 2020)

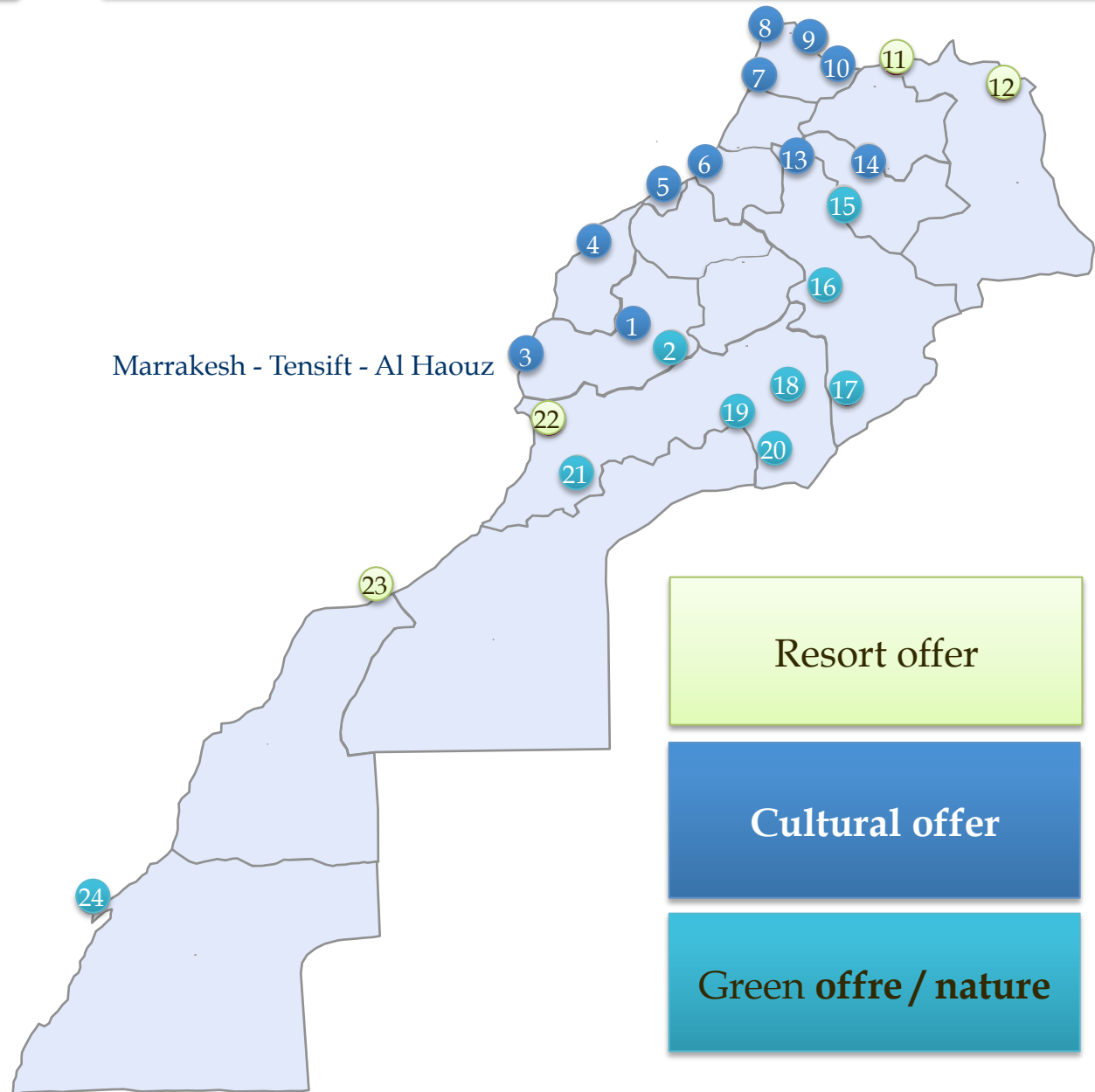


## *Vision 2020*

**By 2020, a portfolio of diversified attractions**

- 1 Marrakech et sa médina
- 2 Jbel Toubkal et Vallées
- 3 Essaouira et environs
- 4 El Jadida et environs
- 5 Casablanca et environs
- 6 Rabat et environs
- 7 Larache, Asilah et environs
- 8 Tanger et environs
- 9 Tétouan et environs
- 10 Chefchaouen et environs
- 11 Al Hoceima, Cala Iris et environs
- 12 Saïdia et son arrière-pays
- 13 Meknès, sa Médina & Volubilis
- 14 Fès, sa médina et son arrière Pays
- 15 Ifrane et environs
- 16 Haut Atlas Central
- 17 Vallée de Ziz et Dunes de Merzouga
- 18 Vallée du Dadès
- 19 Ouarzazate
- 20 Vallée du Drâa
- 21 Tafraoute et oasis
- 22 Agadir et environs
- 23 Laâyoune Guelmim
- 24 Dakhla

Marrakesh - Tensift - Al Haouz



**Resort offer**

**Cultural offer**

**Green offre / nature**

# Conclusion



Tourism development is undeniably linked to the development of the air transport sector.

The development of air transport and the diversification of tourism products, can only be beneficial for travellers and for the development of tourism worldwide.

# Thank You

[www.mtpnet.gov.ma](http://www.mtpnet.gov.ma)  
[n.lakhel@mtpnet.gov.ma](mailto:n.lakhel@mtpnet.gov.ma)

[lakhelnabil@icloud.com](mailto:lakhelnabil@icloud.com)  
[@lakhelnabil](#)